Schedule F: Agency Workforce Plan

Workforce planning is essential in ensuring that the agency retains adequate staff resources to accomplish its mission. In order to comply with regulations required by Section 2056.002 of the Government Code, the agency has conducted a staffing analysis which includes an ongoing process for workforce planning, identification of staff requirements for agency mandates, and a strategy to meet agency goals.

The State Auditor's Office (SAO) compiled the following list of benefits to workforce planning, all of which we find as appropriate goals in this area:

- o prepare for the growing number of retirements
- o identify gaps between current job skills and job skills needed to perform work in the future
- o maintain or recruit a diversified workforce
- o provide an orderly way to address new external or internal environmental changes that could change the workforce
- o prepare for expansion, restructuring, or reduction in the workforce

Our process was to follow the SAO's model for workforce planning, including the following four phases of analysis:

Phase I: Determine Agency Strategic Direction

Analysis of the staff resource needs of the agency has been ongoing since the agency was created on September 1, 2013.

Agency Mission

The agency's mission is to provide secure and meaningful benefits for members and their families, prudently manage assets, and recruit/retain additional members by offering a cost-effective solution to the sponsoring entities.

Agency Scope & Key Functions

Authority for the agency exists under Title 8 of the Texas Government Code, Subtitle H, entitled Texas Emergency Services Retirement System. The primary operational activity for the agency is to administer pension benefits, which requires ongoing work with retirees, actives, departments, and local pension board members, in addition to providing technical assistance to existing departments, and recruiting new departments. The agency distributes pension benefits to retirees on a monthly basis, as well as death and disability benefits. Our work involves heavy customer contact and responsiveness to our customers is paramount. Another important activity is to manage the assets of the System, which is done via investment, actuary, and auditing contractors, managed by the Board and the Executive Director. Lastly, administration of the agency is the other major category of activity.

Phase II: Conduct Workforce Analysis

A review of statutory requirements has been conducted to ensure the agency is in a position to accomplish its mandates. Based on that review, it has been determined that staff resources are sufficient to accomplish the

required functions of the agency.

Critical Workforce Skills

The following skills are critical to the agency's ability to accomplish its goals:

- **Benefits Administration**
    o Retirement/Benefit Processing – Requires attention to detail, analysis, customer service, compassion
    o Documentation Processing – Organization, Attention to detail, understanding System rules
    o Department Reporting – Knowledge of System rules, section policies and procedures
    o Research & Analysis (Actuarial Support, Administrative Inquiries, Departments, Retirees, Oversight Bodies)
    o Provide Technical Assistance to Departments
    o Recruiting New Departments
- **System Administration**
    o Investments & Reporting (contracted)
    o Actuarial Studies & Reporting (contracted)
    o Financial Auditing (contracted)
- **Agency Administration**
    o Accounting, Financial Reporting, & Payroll
    o Information Technology Reporting/Management (partially contracted)
    o Policy Development, Analysis, and Administration
    o Human Resources, Benefits, and Reporting
    o Purchasing and Staff Services
    o Contract Administration
    o Website Management & IT Project Management
    o Reporting to Oversight Bodies (LAR, Strategic Plan, Performance Measures, AFR, Etc.)

Workforce Demographics

Position	Skills	Sex	Race	Retirement Eligibility
Executive Director	Operational Management, Policy Development, State Agency Administration, Public Speaking, Writing, Legislative, Benefits Knowledge, Reporting to Oversight Bodies, Project Management, Working with Boards and Oversight Agencies	M	W	N
Executive Assistant	Organizational Skills, Writing, Customer Service, Operations, Policy Development, Executive Assistance, Meeting Coordination, Human Resources and related reporting	F	W	N
Staff Services Officer	Purchasing, Accounting Records, Writing, Contracting, Facilities Management, Risk Management, Inventory Control, RFP Development, Reporting, State Agency Administration	M	H	N
Deputy Director/Benefits Supervisor	Operations Management, State Agency Administration, Contract Development, Advanced Research & Analysis Benefit Program Management, Customer Service, Policy Development, Writing, Procedures and Processes, Training	F	W	N
Data & Technology Officer	IT Project Management, System Training, Systems Security (Pension System and agency systems), Data Analysis, DIR Reporting, Software and Hardware Recommendations, technology trends	F	H	N
Chief Financial Officer	Advanced Accounting, Pension Accounting, Management, State Agency Administration, investments, Budgeting, Encumbrances, Payroll, Payroll Reporting, Financial Reporting, Investment Analysis, Audit Liaison, Board Reporting	F	W	N
Accountant	Attention to Detail, Retiree and Beneficiary Payroll, Payee setup, Department Billings, Accounts Payable, Deposits, Travel Coordinator, Comptroller Systems Security, Reporting	F	H	N
Recruiting Specialist	Public Speaking, Writing, Marketing, Development of Presentations to local governments/departments, Booths at conferences, follow-up on leads, development of materials, social media management, Design and Media Software	M	W	N
Operations Assistant	Attention to Detail, Communication Skills, Phone Systems, Mail and electronic inquiry processing, data entry, filing, database management, material development, agency website maintenance, social media	F	W	N
Benefits Specialist	Attention to Detail, Math Skills, Retiree benefits, Research & Analysis, Technical Assistance, Customer Service	F	W	N
Benefits Specialist (Lead)	Attention to Detail, Math Skills, Contracts, Research & Analysis, Reporting, Training and Technical Assistance, Customer Service	F	B	N

Employee Turnover

As with any small agency, turnover is an important issue because all employees are key to the organization. We regularly cross-train and believe that if a staff member were to leave we could pick up their duties until the position were filled.

Future Workforce Profile

Recruitment and retention of staff can be a challenge, especially due to salary levels that may be uncompetitive. Presently, due to the experience level of staff in their state government careers, salary levels are moderately competitive. As staff gains more experience and responsibility, it may be a challenge to retain staff due to budget constraints.

Gap Analysis

There are currently not any gaps in terms of skilled workforce for the work that is currently being done at the agency.

Strategy Development

The availability of funds for merit increases in fiscal years 2018-2019 will be important to retaining existing staff, as their increase in experience will warrant pay increases.

Phase III: Implement Workforce Plan

We have communicated our workforce plan to staff. To inform our customers and the public, we have placed photos of our staff on our website, including a description of their skillsets and job responsibilities. There is agreement among staff, the Executive Director, and the Board regarding the Workforce Plan including a high degree of enthusiasm for our new agency.

Phase IV: Monitor, Evaluate, and Revise

Due to our potential for growth, we will continue to monitor availability of staff to meet the needs of the agency. We will review our workforce plan and make adjustments as needed.